HOMELESS MANAGEMENT INFORMATION SYSTEM

Contra Costa County

October 2, 2015

HMIS SP5 Workflow

End User Training

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Version 5 Overview

Counts Reports
Able to 'tag' a client so you can quickly review the client's status.

Example: **My Clients with NULL UDES** will let you know if any tagged client is missing one or more universal data elements.

Home>Main Dashboard

The Dashboard appears when you log on HMIS. Up to 4 **Counts Reports** will load. Which reports display will depend on the user's access level. Case Managers can view up to 4 reports, such as:

- My Clients
- My Clients with expiring ROIs
- My Clients with null UDEs
- My Clients with entry but no exit

Client Profile Summary

The **Client Profile Summary** appears after searching for a client. The Summary can be configured with up to 8 screens (or dashlets). Example: a case manager could have these 5 dashlets:

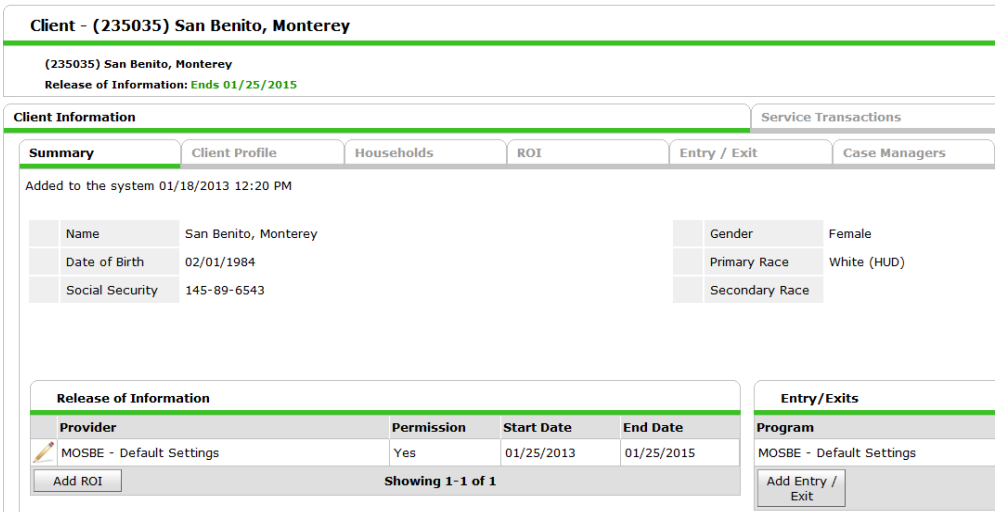
- Release of Information
- Households
- Services
- Entry/Exits
- Case Managers

Using the Client Profile Summary

The Summary Profile Summary is configured so a client's entire HMIS file can be accessed from this page. This means less time navigating back and forth between pages.

Client Summary not configured with dashlets you need? Contact your Agency Administrator or HMIS Coordinator to learn how to update your Summary.

Example of a Client Profile Summary (partial screen shot)



Icons

Print with signature lines

Add to Favorites

Attach photos and documents

Workflow: Table of Contents

Workflow New HMIS client ↓	Workflow Existing HMIS client ↓
Client Search	Updating Client Data
Client Profile Summary	Service Transactions
Single Client	Interim Review
Clients in Household	Updating Disabilities, Income & Benefits
Adding ROI for One or More Providers	Updating Household
Program Entry	Updating Case Plans
Disabilities, Income & Benefits	Program Exit
Case Plans	SkanPoint

Additional Information

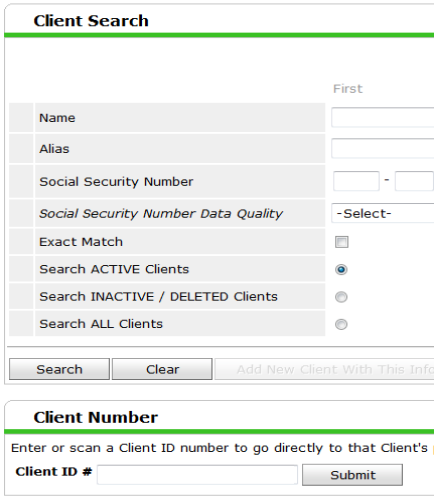
p. 20 How do I …?

… Add an Alternate ID
… Attach a file
… Attach a photo
… Print a form

p. 21 Lock down a client's information

Client Search

In Contra Costa County client data (except entry/ exits and case plans) can be seen by other HMIS agencies **unless**: the client's data is locked or the program is locked.



Logging into HMIS takes you to your **Home>Dashboard**.

Click **ClientPoint** to access the client data section of HMIS.

Is your client already in HMIS? Search for your client, by entering:

- **Name OR**
- **Alias OR**
- **Social Security Number OR**
- **Client ID #** (HMIS # or scan card #)
- Click **Search**

If there is NO match:

- Complete **Name**, **SSN**, **SSN data quality** fields
- Click **Add New Client with this Information**
- Pop up window will appear stating **Create Client?**
- Click **OK**
- Opens to the **Client Profile Summary** page

If there is a match:

If search by name or SSN: potential matches will appear at bottom of screen

- Click to left of Client's name
- You will be taken to the **Client Summary** page

If search by client ID #: taken to the **Client Summary** page

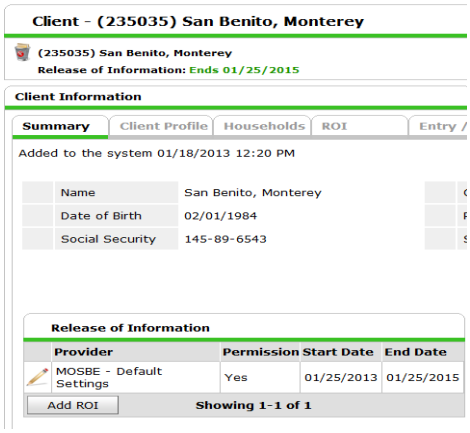
What if client is new to my program, but the client is already in HMIS?

Even if the client was entered in HMIS by another program:

- Review the **Client Summary** page. Update data fields if needed (page 6)
- Add **Release of Information** (ROI) (see page 6)
- Tag client as **My Client** (see page 6)
- Create **Program Entry** (see page 8)
- Enter additional data as you would for any other client

Client Profile Summary

Profile Summary
The Profile Summary gives you an overview of current client data.



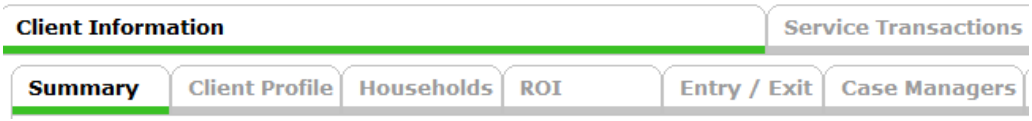
Your **Client Profile Summary** has likely been configured to include the following:

- **Demographic information**
- **Households**
- **Release of Information**
- **Entry/Exit**
- **Services**
- **Case Managers**

Client's HMIS number, Name and ROI expiration date: top left of screen

Workflow Menu options

Below the client's HMIS # and name are a series of workflow tabs:



Client Information: the page you're currently on
Service Transactions: click to add a service transaction or create a referral

The next series of tabs (**Summary, Client Profile, Households**, etc) displays the correct workflow order for entering client data. Click on a tab to enter data for that tab (example: click **Case Managers** to tag the client as your client).

What are the boxes (known as dashlets)?

A dashlet allows client data to be entered without needing to leave the **Client Profile Summary**. The next page details how to enter data in each dashlet.

For Single/Unaccompanied Clients

Workflow for entering a client not already entered in Client Point:

Client in a Household?

Go to next page for details on how to add clients in a household

Households
- Leave this dashlet empty

Release of Information
- Click **Add ROI**
- Complete * data fields
- Click **Save Release**

Entry/Exit
- Click **Add Entry/Exit**. Complete * data fields
- Click **Save Continue**
- **CONTRA COSTA – Standardized Intake** assessment appears at bottom of page.
- Update data fields if necessary. If entered data, click **Save**
- Option to complete other **Assessments**
- Click **Save & Exit**

What do the check marks mean?

Not all data fields completed or not all data fields current

All required data fields complete and current

Case Managers
- Click **Add Case Manager**
- **Type:** if you are the case manager, select **Me**. If someone else is the case manager, select **ServicePoint** user or **Other**
- Complete the * data fields. Click **Add Case Manager**

Services
- Click **Add Multiple Services**
- Complete * data fields
- **Provider:** makes sure correct program selected
- **Start Date/End Date:** defaults to current date. Change if needed
- **Services:** select from drop down menu
- **Funding Sources:** (optional)
- **Status of Need:** select from drop down menu (e.g. **Closed**)
- **Add another service? Click Add Another. Finished? Click Save**

How do I …?

Attach a photo
- Click **Client Profile**
- Under photo, click **Change**
- Click **Browse**
- Locate photo. Click **Upload**

Attach copy of signed ROI?
In the ROI dashlet:
- Click . Page refreshes
- Click (top right)
- Click **Add New File Attachment**
- Locate document, click **Upload**

Print Standardized Intake?
In the Entry/Exits dashlet:
- Click (left of date)
- Click **Save and Continue**
- Scroll down to bottom of page
- Click **Print Entry/Exit**
- Select options. Click **Print**

For Households

Workflow for entering clients who are in a household and who are not already entered in HMIS:

Workflow for creating a new household ➔

On the head of household's Summary page. Find the Households dashlet:

- **C**lick **Start New Household.** Select Household Type
- **Search** for each household member and build the household by clicking on the green plus sign next to their name. If household member does not exist, add as a new client and continue building the rest of the household.
- Click **Continue**
- **Head of Household:** answer **Yes** for head; answer **No** for all other members
- **Relationship to Head:** select best match from drop down menu
- Click **Save & Exit**

How do I …?

Attach a photo
- Click **Client Profile**
- Click **Change**
- Click **Browse**
- Locate photo. Click **Upload**
- Repeat for each member

Attach ROI?
In the HoH ROI dashlet:
- **C**lick Page refreshes
- Click (top right)
- Click **Add New File Attachment**
- Locate document, click **Upload**

Print Standardized Intake?
In the Entry/Exits dashlet:
- **C**lick (left of date)
- Click **Save and Continue**
- Scroll down to bottom of page
- Click **Print Entry/Exit**
- Select options. Click **Print**
- Repeat for each member

From the Head of Household's Summary Profile:

Release of Information
- Click **Add ROI**
- Select household
- Complete * data fields
- Other fields are optional
- Click **Save Release**

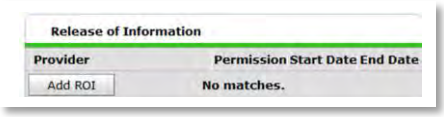
Case Managers
- Click **Add Case Manager**
- Select household
- **Type:** if you are the case manager, select **Me**
- If someone else the manager, select **ServicePoint** user or **Other**
- Complete the * data fields
- Click **Add Case Manager**

Entry/Exits (see next page for more details)
- Click **Add Entry/Exit**
- Select household. Complete * data fields
- Click **Save Continue**
- **Standardized Intake** should already be completed for all members. Optional to complete other displayed assessments
- Click **Save & Exit** when all data entered for the client

Services
- Click **Add Multiple Services**
- Select household member(s). Complete * data fields
- **See previous page for details on how to enter services** (**Services box**)

Adding ROI for One or More Providers:

- Access client's file. Locate ROI on the client's **Profile Summary** page:
- Click add **ROI**



Adding File Attachments
You may want to add one or more documents (example: ROI, photo)

To add a file attachment:
Click **Client Profile** (grey menu bar)

Scroll down until you see **File Attachments**

Click **Add New File Attachment**

Click **Browse**

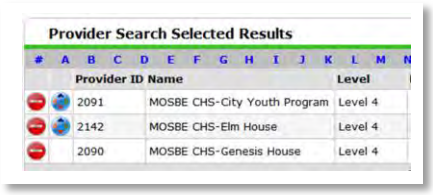
Locate File. Click **Open**
Click **Upload**

The Provider listed is your default provider.

- **No need to change or add additional providers?** Go to **Release Granted**

Need to change Provider or add multiple providers?

- Click **Search**
- Search for Providers by **Search** (enter name or a keyword) or by **Provider ID #**
- Click ⊕ to left of each provider to add that provider
- Selected providers will appear in **Provider Search Selected Results**
- **All Providers added?** Click **Exit**


Provider Search Selected Results
A B C D E F G H I J K L M N
Provider ID Name
Level
2091 MOSBE CHS-City Youth Program Level 4
2142 MOSBE CHS-Elm House Level 4
2090 MOSBE CHS-Genesis House Level 4

- **Release Granted:** select Yes or No
- **Start Date:** defaults to current date. Change if necessary
- **End Date:** three (3) years after start date
- **Documentation:** select best match
- **Witness:** optional

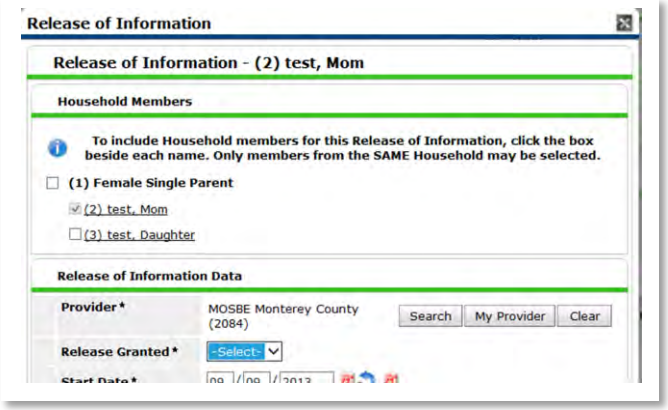
The workflow for adding the ROI for households is the same except:

The Multiple-Provider ROI Function Must Be Turned on Manually

To enable it:

- Click Admin
- Click Provider Admin
- Search your provider, then click the pencil
- Click Module Settings tab
- Click ServicePoint Settings
- Check the box "Allow the selection of multiple providers when adding Releases of Information"

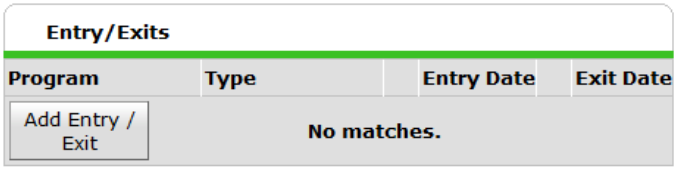
- Click **Add ROI**
- Select members for whom the ROI will be added
- Continue with same workflow as for single client


Release of Information
Release of Information - (2) test, Mom
Household Members
To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.
(1) Female Single Parent
(2) test, Mom
(3) test, Daughter
Release of Information Data
Provider*
MOSBE Monterey County (2084)
Search
My Provider
Clear
Release Granted*
-Select-

Program Entry

Note: *There is no longer a separate child assessment for Contra Costa. The children questions will be embedded in the Contra Costa Standardized Intake. Multiple assessments should show only at Interim. Entry and Exit have only the Standard Assessment mapped.

Locate the Entry/Exits box on the client's Profile Summary page:



Workflow for creating a program entry for a SINGLE client ➔

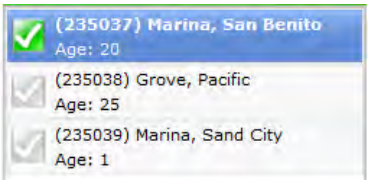
- Click **Add Entry/Exit**
- **Provider:** select correct program
- **Type:** select HUD **Entry Date:** change if necessary
- Click **Save & Continue**
- Enter new data or update existing data **CONTRA COSTA – Standardized Intake**
- Click **Save & Exit** .

Workflow: creating a program entry for a Household ➔

The workflow for creating a household program entry is the same except:

Household Members
Note: To update Household members for this Entry Data,
(49305) Two Parent Family
(235037) Marina, San Benito (Entry Date: 01/29/2013 10:17 AM)
(235038) Grove, Pacific (Entry Date: 01/29/2013 10:17 AM)

- Click **Add Entry/Exit.**
- Select members to include in the entry and click **Save & Continue.**
- Enter data in the **CONTRA COSTA – Standardized Intake**
- Click **Save** and on the left tab, click on the next household member.



- Client's checkmark will turn green once all his/her required data fields are saved
- Repeat above process until all members have green check marks.

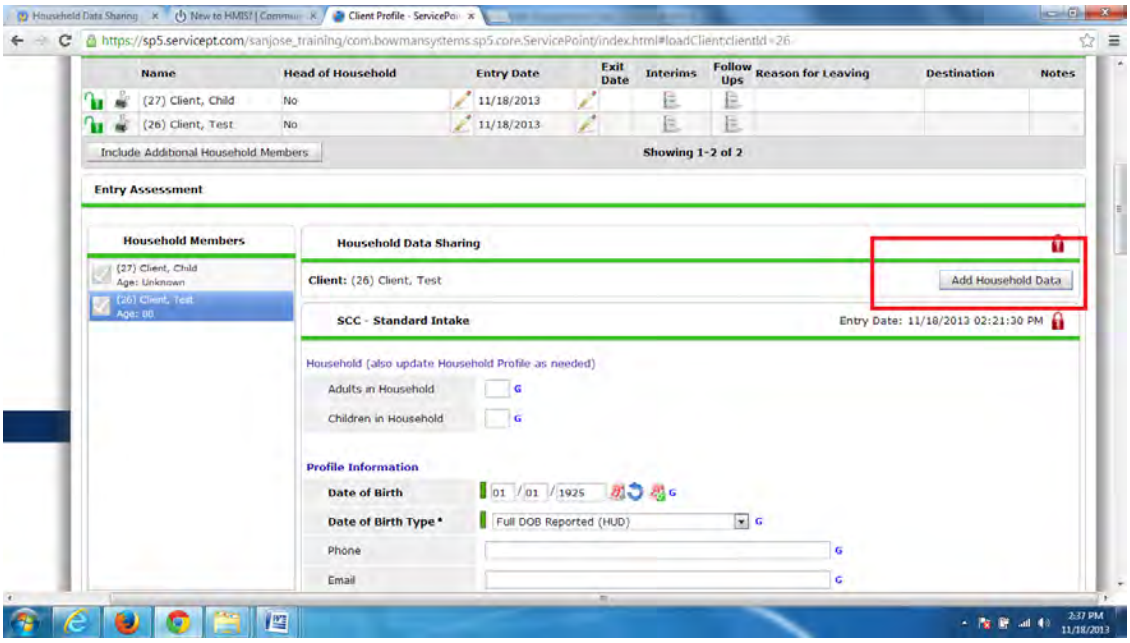
- **All data entered?** Click **Save & Exit**

Household Data Sharing

Household Data Sharing is an assessment that allows you to answer the questions while in one client record, and the answers are automatically distributed to the other client records in the household.

You will see an "Add Household Data" button at the top of the Entry and Exit Assessment screen.

Agencies are encouraged but not required to use this tool. It ensures data quality through household consistency in data collection.



Disabilities, Income & Benefits

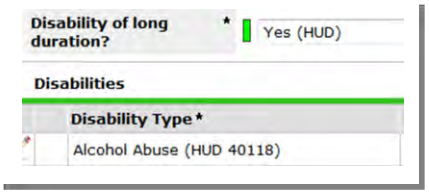
Located within the Standardized Intake Assessment are three sub-assessments:

- **Disabilities** | **Monthly Income** | **Non-Cash Benefits**

Workflow for entering Disabilities sub-assessment data ➔

Does client have a disabling condition?

- Answered **No?** Skip **Disabilities**
- Answered **Yes?** Click **Add**
  - **Disability Type:** enter best match
  - **Disability Determination:** Answer Yes if client has this disability, answer No if otherwise.
  - **Start Date:** leave as is
- All other fields are optional
- Click **Save and Add Another** (if another disability) or **Save** (if done)



Workflow for entering Monthly Income sub-assessment data ➔

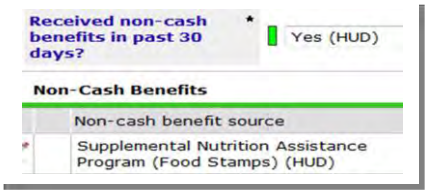
Income received from any source?

- Answered **No?** Skip **Monthly Income**
- Answered **Yes?** Click **Add**
  - **Source of Income:** select best match
  - **Was income received from this source in the past 30 days?:** Answer Yes or No
  - **Monthly amount:** enter amount
  - **Start Date:** leave as is
  - All other fields are optional
- Click **Save and Add Another** (if another source) or **Save** (if done)

Workflow for entering Non-Cash Benefits sub-assessment data ➔

Received non-cash benefits in past 30 days?

- Answered **No?** Skip Non-Cash Benefits
- Answered **Yes?** Click **Add**
  - **Source of Non-cash benefit:** select best match
  - **Receiving benefit?** Answer Yes or No
  - **Start Date:** leave as is
  - All other fields are optional
- Click **Save and Add Another** (if another benefit) or **Save** (if done)

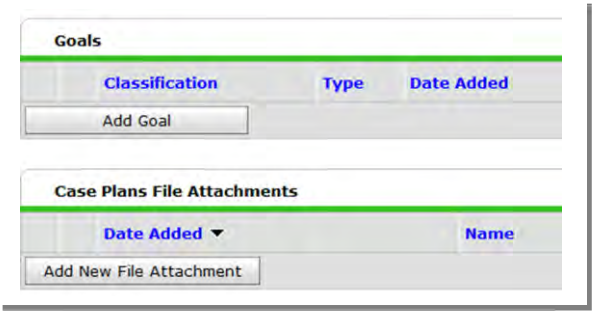

Received non-cash benefits in past 30 days? *
Yes (HUD)
Non-Cash Benefits
Non-cash benefit source
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)

Case Plans

Click the Case Plans tab on the client Profile Summary (top of screen):

Goal for household?
Select member(s) to include (top of page) before entering any other data

Goals



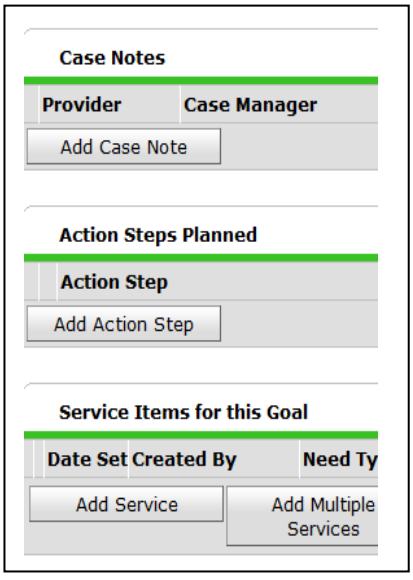
- Click **Add Goal**
- Enter data in ***** fields
- **Case Manager**: select best match
- **Classification:** select best match from menu
- **Type:** select best match
- **Overall Status:** select **In Progress** or select **Closed (**if the goal achieved or abandoned)

Optional: completing the Follow Up section
Complete the Follow Up section if you wish to be reminded of any commitments made
Click **Add Goal**

Optional features appear: Case Notes, Action Steps, Service Items

Add File Attachments
- Click **Add New File …**
- Click **Browse**
- Locate document
- Click **Open**
-Click **Upload**

Case Notes



- Click **Add Case Note**
- Enter data in ***** fields
- **Case Manager:** select **Case Manager**
- **Note:** copy or type note
- Click **Save Case Note**
- Select to read a note

Actions Steps

If you wish to enter actions items associated with the goal:

- Click **Add Action Step**
- Enter data in ***** fields
- **Action Step:** detail action item
- Click **Save Action Item**

Service Items

Optional: enter service transaction(s) associated with this goal:

- Click **Add Service**
- Enter service transaction. Go to page 11 for details on how to enter a service transaction.

- Click **Save & Exit**

Updating Client Data

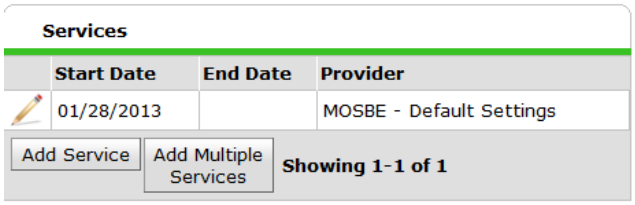
The workflow described so far details how to enter new clients in HMIS. Once you have entered clients as described in the previous pages, you will need to return on a regular basis to update the client's data. This will include:

Workflow for updating client's data begins on page 13 (next page)

- **Adding Service Transactions**
- **Updating Disabilities, Income & Benefits**
- **Adding Interim Matrix (if using the Matrix)**
- **Entering Interim Reviews and Annual Assessments**
- **Updating Goals and Case Plans**
- **Creating a Program Exit (when client leaves your program)**

Service Transactions

Locate the Services box on the client's Profile Summary page:



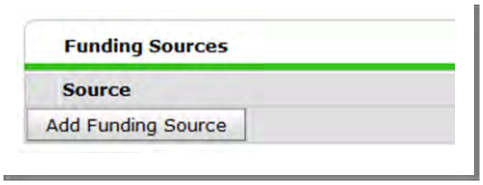
- Click **Add Multiple Services**
- Provider: select correct program
- **Start/End Date:** change if necessary
- **Service:** select from drop down menu
- **Status of Need:** select best match
- **Need to add another service?** Click **Add Another**
- **Finished added services?** Click **Save**

Service for household? Select member(s) to include in transaction (top of page) before entering any other data

Optional: Funding Sources

Want to track financial information (funding source, dollar amount of the service)?

- Click **Add Funding Source**
- **Source:** select fund
- **Amount:** enter $ amount
- **Add another source?** Click **Save and Add Another**
- **Done?** Click **Save**



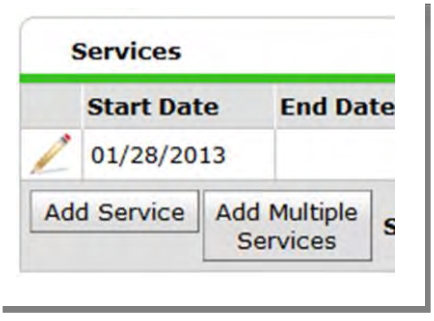
Optional: Adding Notes, Follow-ups

Want to add a note and/a follow-up (a reminder of next appointment with client)**?**

- Click ✎ of transaction to update
- **Service Notes:** copy or type note
- **Projected Followup Date:** enter date
- Click Save **& Exit**

After follow-up is made, enter:

- **Follow Up Made:** select **Yes** or **No**
- **Completed Follow Up Date:** enter date you met with client
- Click Save **& Exit**

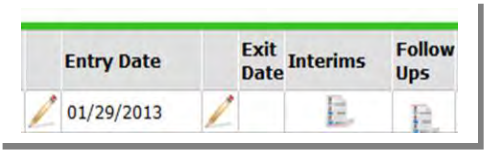


Interim Review

Use Interims to update client data while client is in your program ➔

Interim Reviews are used after a client has entered or enrolled in a program but before the client is exited. An interim review allows an agency to capture client data 'as of' a specific date.

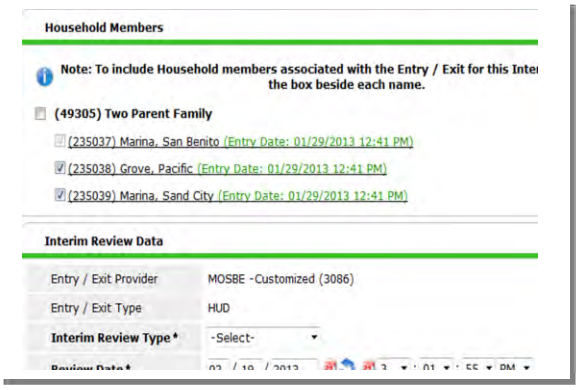
From the Client Profile Summary page:

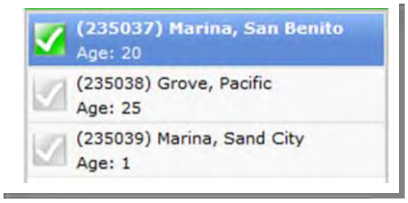


- Locate the **Entry/Exits** dashlet
- Click to left of **Entry Date**
- **Edit Entry Data** box appears **(leave data as it appears)**
- Click **Save & Continue. Entry/Exit Data** box appears
- Click in the **Interims** column. Click **Add Interim Review**

Client in household? Members automatically selected if members were selected for program entry

- **Interim/Review Type:** select best match
- **Review Date:** change if needed
- Click **Save & Continue**
- **Interim Review Assessment** will display
- Enter data as needed
- Click **Save** when done

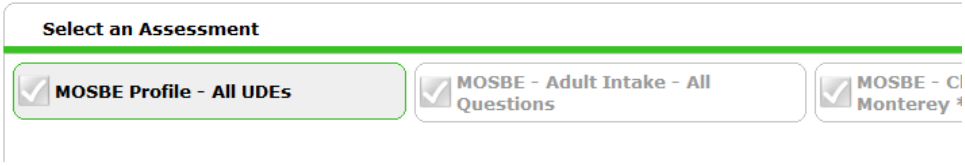

Household Members
Note: To include Household members associated with the Entry / Exit for this Inte
the box beside each name.
(49305) Two Parent Family
(235037) Marina, San Benito (Entry Date: 01/29/2013 12:41 PM)
(235038) Grove, Pacific (Entry Date: 01/29/2013 12:41 PM)
(235039) Marina, Sand City (Entry Date: 01/29/2013 12:41 PM)
Interim Review Data
Entry / Exit Provider
MOSBE -Customized (3086)
Entry / Exit Type
HUD
Interim Review Type*
-Select-



- On the next screen, fill out the Standard Interim Assessment for each member of the household. Client's checkmark turns green if all required data fields have been answered answered.
- Click next client and repeat above process until all members have green check marks.
- **All data entered?** Click **Exit**

Client data needing updating not in Interim Reports?

Data fields needing updating not on Interim Report? Choose from list of interim assessments (must be set up by your Agency Administrator):



- **Select an Assessment:** select best match
- Selected assessment will appear. Update data field(s) for each household member.
- Click **Save**

Updating the Disabilities, Income & Benefits sub-Assessments

A client's disability, income or benefits may change while enrolled in your program. These changes should be recorded in HMIS in order to accurately track a client's ability to be more self-sufficient.

- Click **Interim Review button**
- **Select date of Interim Review**
- **CONTRA COSTA – Standard Interim/Exit** should display.

Updating Disabilities

Client no longer living with a disability?

- Click to left of disability
- **End Date:** enter data

Client has no new disability?

- Click **Save**
- **Disability of long duration?** Change answer to **No**

Client has new disability?

- Click **Save and Add Another**
- Enter new disability data
- Click **Save**
- **Disability of long duration?** Answer **Yes**

Updating Monthly Income

Client no longer has an income source?

- Click to left of income amount
- **End Date:** enter data

Client has no new income?

- Click **Save**
- **Received income past 30 days?** Change answer to **No**

Client has new income source?

- Click **Save and Add Another**
- Enter new income data
- Click **Save**
- **Received income past 30 days?** Answer **Yes**

Updating Non-Cash Benefits

Client no longer has benefit source?

- Click to left of benefit source
- **End Date:** enter data

Client has no new benefit?

- Click **Save**
- **Received non-cash …?** Change answer to **No**

Client has new benefit source?

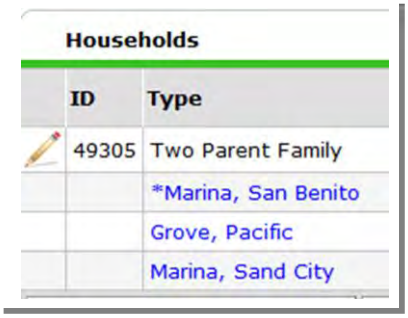
- Click **Save and Add Another**
- Enter new benefit data
- Click **Save**
- **Received non-cash …?** Answer **Yes**

Updating Existing Household

The household may change after program entry … a household member leaves or a new member joins the existing household.

To start the updating process:

- Go the head of household's **Client Profile Summary**
- Scroll down to **Households** dashlet
- Click ✎ to left of **ID**



Removing a member

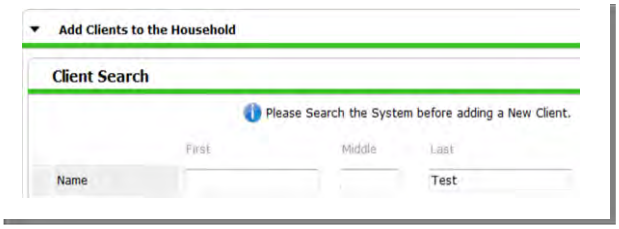
- Click "Add/Delete Household Member"
- Click trash can icon to left of member's name
- Click **Save**
- Page refreshes. Member deleted no longer visible in household
- **Household type:** may have to update
- **If update household type:** click **Save & Exit**

Workflow for removing a member ➔

Adding member to existing household

- Go to the head of household's **Client Profile Summary**
- Scroll down to **Households** dashlet
- Click ✎ to left of **ID**

- Click **Add/Delete Household Members**
- Click ▸ **Add Clients to the Household**
- **Client Search** appears
- **Search f**or household member. If he/she does not exist in the database, add a new client record.
- Repeat process until all members have been added.
- Click **Continue**



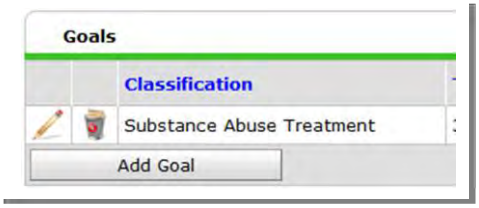
- Update **Household Members** fields to reflect new household
- For example: enter or update data in **Head of Household** and **Relationship to Head of Household**
- **Household Type:** may need to update
- Click **Save & Exit**

Updating Case Plans

As the client progresses in your program it may be necessary to:

- **Close an existing goal**
- **Enter a new goal**
- **Add a case note or add a file attachment**

Click the Case Plans tab



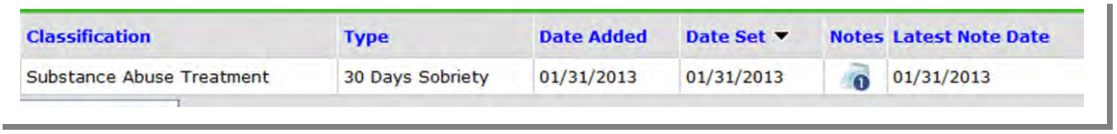
To close a goal:

- Click to left of **Classification**
- **Overall Status:** select best match
- **If Closed, Outcome:** select best match (enter data only if selected Closed for Overall Status
- **Date** (optional)**:** enter date goal was closed
- **If Partially Complete …** (optional)**:** select best match
- Click **Save & Exit**

To enter one or more new goals:

- Click **Add Goal**
- Follow workflow as described in Case Plans (page 11)

To enter case note to an existing goal:



Classification	Type	Date Added	Date Set	Notes	Latest Note Date
Substance Abuse Treatment	30 Days Sobriety	01/31/2013	01/31/2013		01/31/2013

- Click **Notes**
- Click **Add Case Note**
- **Provider:** select correct provider
- **Case Manger:** select **Case Manager**
- **Note:** enter case note
- **Note Date:** update if needed
- Click **Save Case Note**
- Click **Cancel** to exit pop-up window

To add a file attachment:

- Click in **Goals** box (right side of screen) **OR**
- Click **Add New File Attachment** in **Case Plans File Attachments** box
- Follow prompts to find attachment on your computer
- Click **Upload**. File will appear

Program Exit

Create a Program Exit when the client leaves your program. From the Client Profile Summary, click the (left of **Exit Date**):

- **Client in Household? Select members**

Workflow for Single Clients ➔

- **Exit Date:** change if necessary
- **Reason for leaving:** select best match
- **Destination:** select best match
- **Notes** (optional)
- **Click Save & Continue** (page will refresh)
- **CONTRA COSTA – Standardized Interim/Exit Assessment** will appear: update as needed
- **If client is single:** Click **Save & Exit**
- **If client is in household?** Click **Save and look to left side to see Household Members**

Workflow for Households ➔

- Click the name of client immediately below client with green checkmark
- Fill out the Standard Exit assessment for each member until all members have green checkmarks
- Click **Save & Exit**

SkanPoint

SkanPoint allows for the quick entry of service transactions for clients or for entire households with the swipe of a card. SkanPoint can also be used without a card/card reader if you have a list of client ID numbers.

Print client skancards

- You must have a Skancard template already set up in ART. Once set up, you can print skancards for a group of clients or for a single client.

Scan single service

Scan single service for one or more clients ➔

- Click **SkanPoint** (left side of screen)
- **Provider:** select program
- **Service:** select from drop-down menu
- **Start/End Date:** defaults to current date and time
- Optional**: Service Notes**, **Funding Sources**
- Click **Start Skan**. Page refreshes to **Skan ID Cards**
- Swipe card (or manually enter Client ID number). Repeat until all clients scanned
- Click **Exit** when all clients scanned

Want to add members?
As each client scanned, household screen appears. To add members to servive, click member(s) to add. Click **Save**

Scan multiple services

Scan multiple services for one or more clients ➔

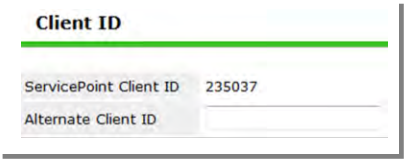
- Click **Skan Point** (left side of screen)
- Click **Multiple Service** tab (top of screen)
- **Provider:** select program
- **Service:** select from drop down menu
- **Status of Need:** closed
- Click **Add Another**
- Repeat (if necessary) until all services added
- Click Start Skan
- Swipe cards and add household members (if applicable) as described in **Scan Single Service**

How do I ...?

A grey menu bar (top of page) can be seen on any page in Client Point. Use the grey menu bar to do any of these specialized functions:

Add Alternate Client ID (used in SkanPoint)

- Click **Client Profile** tab. **Client ID**: click
- Place cursor in **Alternate Client ID** field
- Scan bar code on card **OR** manually enter letters and numbers below bar code
- Click **Save**



Attach a file

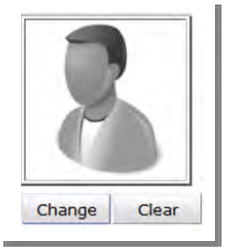
- Click **Client Profile** tab
- Scroll down until **File Attachments** box visible
- Click **Add New File Attachment**
- Click **Browse**. Locate file. Click **Upload** **OR**

Attach a file on one of these tabs: ROI, Entry/Exit, Case Plans, Assessments

- Click the tab where you want to attach a file
- Click , then click **Add New File Attachment**. Follow same steps as described for attaching file on the Client Profile tab

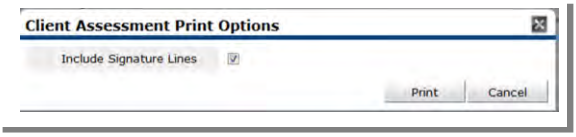
Attach a Photo

- Click **Client Profile** tab
- Click Change under photo icon
- Click **Browse**. Locate photo
- **Description: client photo** (enter these words in the Description box)
- Click **Upload**



Print a form

- Click **Assessments** tab
- Select the assessment (form) to print. Click **Submit**
- Scroll down to bottom of page
- Click **Print Assessment**
- **Include Signature Line**: uncheck box if no signature line needed
- Click **Print**
- Print box will appear. Click **OK**



Locking Down a Client's Record

Client information in HMIS defaults to open. Information entered (except case plans) will be seen by other Partner Agencies in your county. Client information cannot be seen by agencies in other counties.

You may have a client who is not comfortable with other programs seeing their data in HMIS. To lock down a client's data follow the steps below (NOTE: name, DOB, SSN, and gender (if entered) remain visible for deduplication purposes):

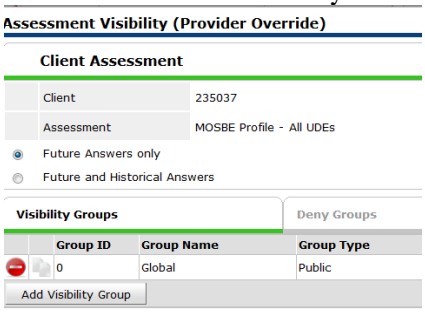
- On the **Client's EntryExit** screen, find the two padlocks:

- Click on the first padlock and the **Assessment Visibility** window appears
- Click the next to Global.
- Click **Save**

The padlock should now look like this:

Repeat the above process for the second padlock. This locks down all data entered in the **Intake assessment.**

- Ensure **Future Answers only** boxed is checked



- Repeat the above process for each household member and for any additional assessments you complete.